# Welcome to the eWiSACWIS Reports User Acceptance Testing Webcast

eWiSACWIS Project November 28th, 2005

### Introductions

- Presenters
  - Barry Mickelson
    - Reports Coordinator, DCFS/OPEP
  - Mia Spooner
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# Session Agenda

- Overview of eWiSACWIS report process
- Testing eWiSACWIS reports
- State/County collaborative testing process

## Overview of eWiSACWIS Report Process

- Origin of reports
- Collaborative process
- Design anomalies
- Report Modifications
- Wants & Wishes

# Overview of eWiSACWIS Report Process

- Origin of Reports
  - Inherited additions
  - Federal requirements
  - State requirements
  - County requirements

### Overview of eWiSACWIS Report Process

- Origin of Reports
  - Summary Reports
    - Designed for all persons to use
    - Understandable headings
    - Report keys with definitions
    - Simple so output can be in multiple tables

# Overview of eWiSACWIS Report Process

- Origin of Reports
  - Case Detail Reports
    - Designed to provide more detail
    - Excel output for more in-depth analysis
      - Allows filtering
      - Allows Pivot Tables

## Overview of eWiSACWIS Report Process

- Collaborative User Acceptance Testing (UAT) Process
  - 3 groups of people
    - Technical Developers
    - OPEP staff
    - County volunteers
- Will be discussed in more detail later

## Overview of eWiSACWIS Report Process

- Design Anomalies
  - Original specification differences
  - Mass changes like site capabilities
  - Customizations
  - Errors of omission, commission

# Overview of eWiSACWIS Report Process

- Report Modifications
  - State requirements
  - County requirements
  - Worker requirements

### Overview of eWiSACWIS Report Process

- Wants and Wishes
  - Different Frequencies of Reporting
  - Different Sort Orders, sums, and totals
  - Different Data Items more, or less items
    - On Reports
    - On Detail Extracts
  - New requirements

# eWiSACWIS Reports Testing

- Understanding Report Design Guides
- Report Outputs
- Testing Tips

### **Understanding Report Design Guides**

- Report Content
  - The Report Content, or Definition, section of eWiSACWIS report design guides indicates the purpose of the report and what type of information the report will provide.

## **Understanding Report Design Guides**

- Report Population
  - You will often see this section of the guide being referred to as the 'initial data scrape' or the 'report details'. The report population indicates what criteria is being used to retrieve the data that is going to be used to create the report.

eWReports Placement Detail

Definition

This report provides the details of all children who were in an open out-of-home placement or received in-home service:

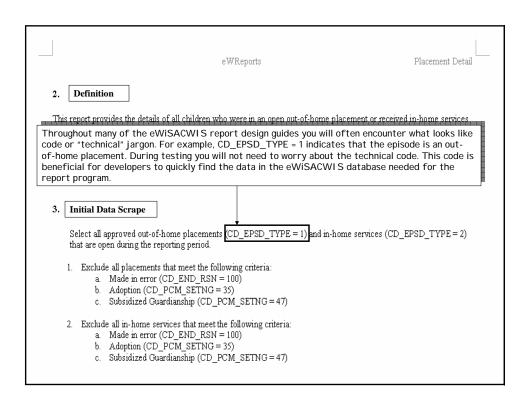
This example shows the data scrape needed for the Placement Detail Report. Essentially this report will include all out-of-placements and in home services during the reporting period. For most standard reports the reporting period is from the beginning to the end of the month. Notice the report population is not including all placement and service types. The design guides will make note of any data that particularly needs to be excluded from the data scrape.

3. Initial Data Scrape

Select all approved out-of-home placements (CD\_EPSD\_TYPE = 1) and in-home services (CD\_EPSD\_TYPE = 2) that are open during the reporting period.

- 1. Exclude all placements that meet the following criteria:
  - a. Made in error (CD\_END\_RSN = 100)
  - Adoption (CD\_PCM\_SETNG = 35)
  - Subsidized Guardianship (CD\_PCM\_SETNG = 47)
- Exclude all in-home services that meet the following criteria:
   a. Made in error (CD\_END\_RSN = 100)

  - Adoption (CD\_PCM\_SETNG = 35)
  - c. Subsidized Guardianship (CD\_PCM\_SETNG = 47)



### **Understanding Report Design Guides**

- Report Distribution
  - The Report Distribution section of the report design guides indicates how often a new run of the report will be available (Monthly) and if the report can be run on an "on demand" basis in eWReports.
  - Requesting reports On Demand allows a worker to set there own date parameter for a report.

### **Understanding Report Design Guides**

- Outputs
  - An output is a file that is generated by running the program for the report.
  - For many of the standard, PEP, and outcome measurement reports, the files generated are either in an Excel (.xls) or MS Word (.doc) format.
  - Reports can have one output that is generated by the program or multiple outputs.

### 4. Report Distribution

- Monthly report will show up monthly on worker's eWReports home page.
- On Demand worker can request the report with customized dates in eWReports.

#### 5. Outputs

The following outputs will be available for this report. A description is provided below:

- Output #Î sm10a32a-placement-detail-All-County xls this is an excel file containing a combined case
  detail or summary report across all counties. The all county reports are only available to those users with the
  specified security.
- Output #2 sm10a32a-placement-detail-(county):x/s this is an excel file containing a case detail report for the county specified. Many reports will have a case detail excel file for each county.
- Output #3- sml Oa32b-placement-detail-smry-{county} doc this is a MS Word file containing the summary
  report for the county specified. Many reports will have a summary report field for each county.

The design guides will indicate what type of output files are generated by the report program. In this example, the Placement Detail Report will generate three types of output files: 1) An all county detail report in Excel format 2) A detail report in Excel format for each county 3) A summary report for each county in Word format. The names of these files always begin with a topic code (e.g. sm10a32a). The topic code is a reference to what topic the report belongs. For instance, sm10a is a reference to the Placement/Services topic. Workers don't need to worry about these codes, the report name will also be displayed.

Date/Time: 09/10/2005 10:41 AM

County: Dane

eWReports

Placement Detail
Report ID: SM10A32
Page: 2

Wisconsin Dept. of Health and Family Services Division of Children and Family Services In-Home Services Summary Placement Detail Report

Children Receiving In- Home Services	Services Open	Services Ended	Current Open Services

Service	Number of Services	Days in Service	Current Open Services
	Delvices	Delaice	Delvices
Detention			
Hospital			
Pre-Adoptive Home			
Child Res w/Family (Not			
AA)			
Respite			
Direct Service			
Administrative			

The design guides include a Report Examples section which displays a mock-up representation of the summary reports.

eWReportsPlacement Detail

#### 7. Report Key

#### 7.1 Out-of-Home Placement Summary

Report Column	Report Column Definition		
Children in Out- of-Home Care	Number of children that were in an open placement at any point during the query period.		
	Number of removals from home documented at any point during the query period.		
Total Placements	Number of placements open at any point during the query period.		
Discharges	Number of discharges from placement document at any point during the query period.		
Current Open Placements	Number of placement still open at the end of the query period.		
Placement Setting	List of out-of-home care placement setting types.		
Number of Placements	Number of placements open at any point during the query period for each placement setting.		
Days in Care	Number of days child was placed in the associated placement setting over the course of the query period.		
Current Open Placements	Number of current open placements by placement setting.		

The design guides will also include a Report Key which details the report field names for the summary report along with their descriptions. The report keys are very useful in determining what information the summary report provides.

eWReports 8. Field Descriptions

Sort data by:

County of the primary worker

Site of the primary worker

Supervisor Name

Worker Name

Case Name

The Field Descriptions section provides a list of all the detail columns that will be displayed in the Excel spreadsheet of the case detail report. This table provides the Field name and how the data for this field is pulled from the eWiSACWI S application.

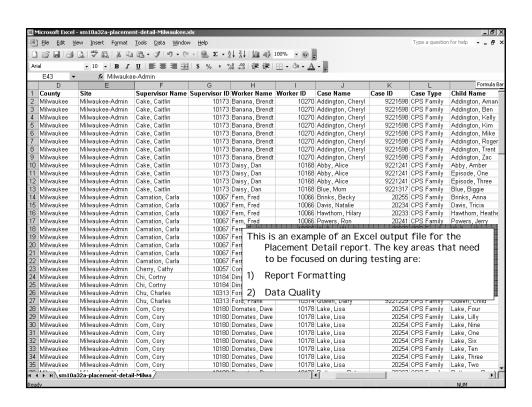
Placement Detail

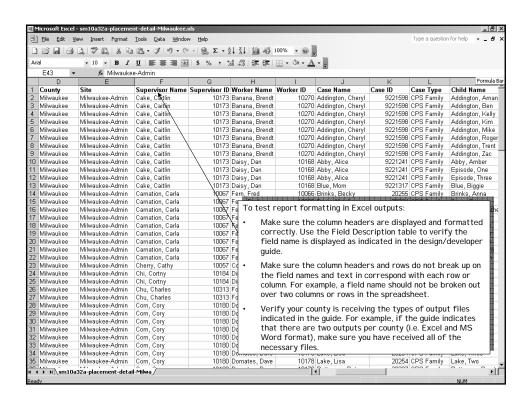
Field	Description/Notes	
Run Date	System date at time of report run. Includes timestamp	
Query Start	Report period begin date.	
Query End	Report period end date.	
County	County is pulled from the assignment record returned by the database function F_CASE_ASSIGN. The Report Date is passed as a parameter.  ASSIGNMENT.CD_OFC_DIV translated to LOCATION.TX_OFC_DIV	
Site	Site is pulled from the assignment record returned by the database function F_CASE_ASSIGN. The Report Date is passed as a parameter.  ASSIGNMENT.CD_DEPT_UNIT translated to LOCATION.TX_DEPT_UNIT	
Supervisor Name	The Supervisor Name is pulled from the Person record for the Supervisor ID returned PERSON.NM_LST, NM_FRST.	
Supervisor ID	The Person ID of the Worker's supervisor (WORKER.ID PRSN SPRV).	
Worker Name	The Worker Last Name is pulled from the Person record for the Worker ID returned PERSON.NM_LST, NM_FRST.	
Worker ID	The Worker ID is pulled from the assignment record returned by the database function F_CASE_ASSIGN. ASSIGNMENT.ID_PRSN	
Case Name	Pulled in based on Case ID (CASE.NM_CASE_LST, NM_CASE_FRST).	
Case ID	The Case ID is pulled from the placement or in-home service record (EPISODE.ID_CASE).	
Case Type	Text Value for CASE.CD_CASE_TYPE (ID_GRP = 'CASETYPE')	

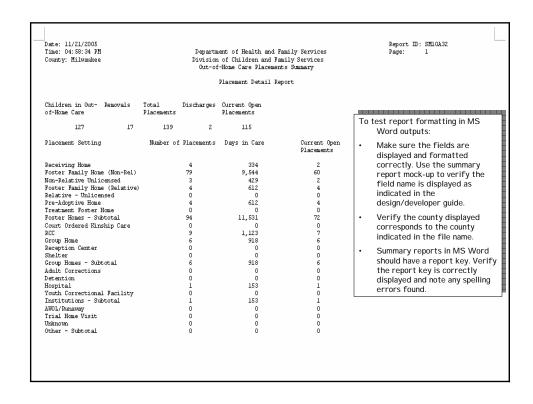
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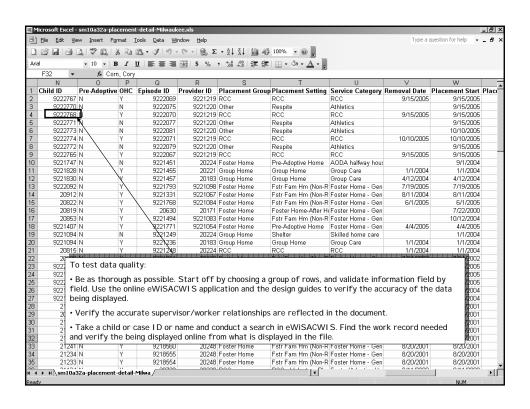
### **Report Outputs**

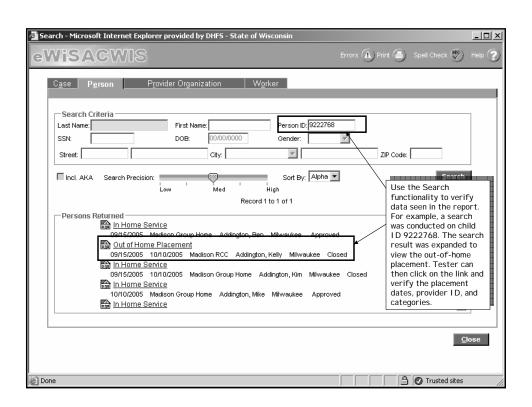
- Outputs for most eWReports exist in these types of files:
  - Excel
    - This format is used mostly for comprehensive detail reports with many columns of information. The main benefit of the Excel outputs is data can be sorted in many different ways.
  - MS Word
    - This format is used mostly for summary reports. Report outputs in MS Word do not allow for data sorting. However, they are more user friendly and require do not margin manipulation prior to printing.







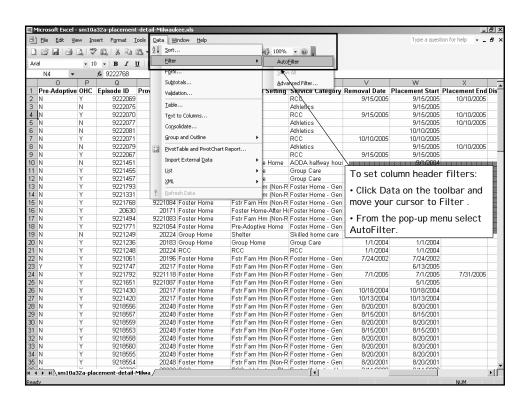


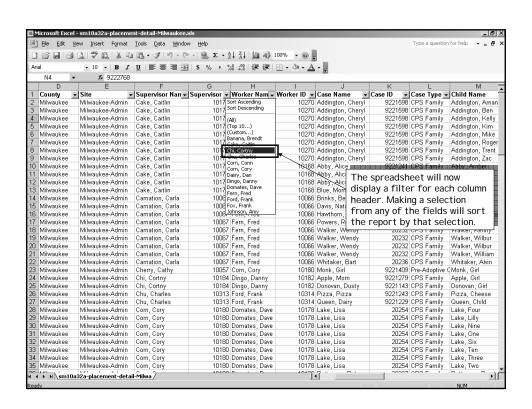


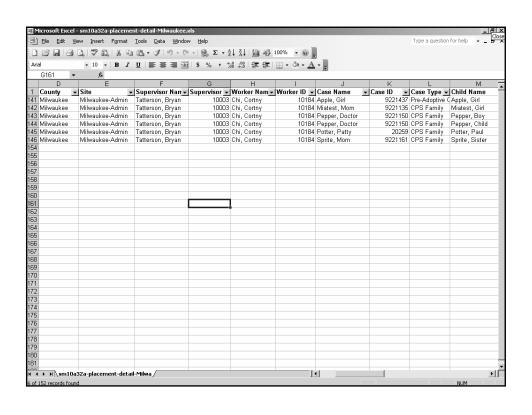
Date: 11/21/2005 Time: 04:58:34 PM County: Milwaukee	Division	ment of Health and F n of Children and Fa f-Home Care Placemen	mily Services	Report ID: SM10A32 Page: 1
		Placement Detail Re	port	
Children in Out- Removals of-Home Care	Total Discharges Placements	Current Open Placements		
127 17	139 2	115		
Placement Setting	Number of Placements	Days in Care	Current Open Placements	
Receiving Home	4	334	2	
Foster Family Home (Non-Rel)	79	9,544	60	To test data quality:
Non-Relative Unlicensed	3	429	2	• If there are totals in the summary
Foster Family Home (Relative)	4	612	4	
Relative - Unlicensed	0	0	0	report make sure they add up.
Pre-Adoptive Home	4	612	4	V16. d-t- 6 th
Treatment Foster Home	0	0	0	Verify data from the summary with
Foster Homes - Subtotal	94	11,531	72	the data displayed in the detail
Court Ordered Kinship Care	0	0	0	report. Data for the summary is
RCC	9	1,123	7	pulled from the detail reports.
Group Home	6	918	6	panea 11 oin the actain reports.
Reception Center	0	0	0	Verify the report keys are
Shelter	0	0	0	displayed at the end of the summary
Group Homes - Subtotal	6 0	918	6 0	
Adult Corrections Detention	0	0	0	report. Note the descriptions used
Hospital	1	153	1	in the key for clarification.
Youth Correctional Facility	0	. n	0	Look at the numbers being
Institutions - Subtotal	1	153	1	
AWOL/Runavay	n n		0	displayed and note if they are off
Trial Home Visit	ő	Ď	ů	from what you know is the actual
Unknown	ō	ō	ō	workload.
Other - Subtotal	0	0	0	

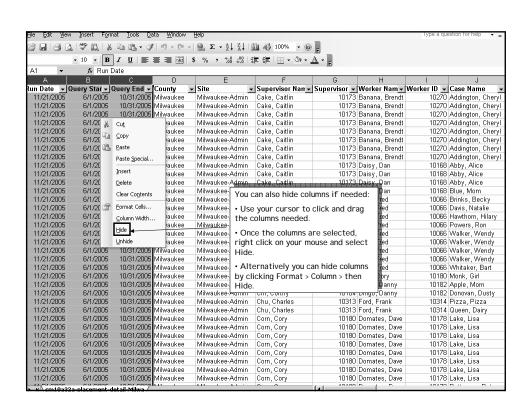
# **Testing Tips**

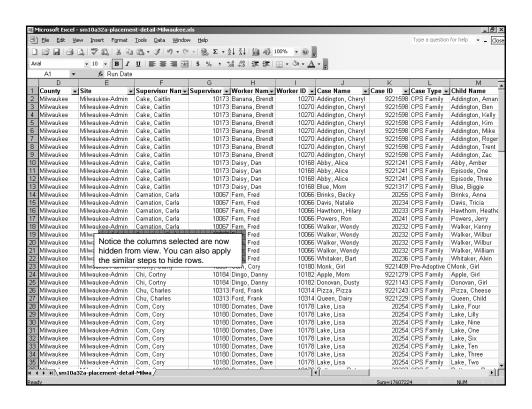
- Keep in mind that the data in the Excel outputs can be filtered and sorted to display the information needed.
- Columns can also be hidden from view to make reports smaller and limit what is displayed.











# State/County Collaborative Testing Process

- Roles of State and County Staff
- Provision and Use of Report Design Guides
- County Testing and Feedback of Results
- Summarize County Feedback for Report Corrections

# State/County Collaborative Testing Process

- Roles of State, County, and Contract Staff
  - State coordination and communication
  - County volunteer recruitment efforts
  - Contract Staff preparation steps
  - Contract and State analysis of changes

# State/County Collaborative Testing Process

- Provision / Use of Report Design Guides
  - Email communications
  - Reports Design Guides
  - Report testing dates for starting, ending

# State/County Collaborative Testing Process

- County Testing and Feedback of Results
  - Testing and data analysis
  - Email testing results to Reports Coordinator
    - List case ID's for cases incorrectly included or excluded
    - Explain why they should be in or out
    - Run date of the output so we can check those cases

# State/County Collaborative Testing Process

- Summarize County Feedback for Report Corrections
  - Analyze and classify testing results
  - Create collaboration reports and distribute

# Questions?

■ Please send any feedback or questions to:

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